Empirical Mapping of Customer's Expectation from Organized Apparel Retail Outlets

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Abstract: **India is a nation is shoppers with highest retail density in the world (Srivastava, 2008). The journey of Indian retail covers weekly haats, small shopping establishment, mom and pop stores and last 25 years have witnessed evolution of mall culture as well, which in its initial years was limited to bigger and metro cities but in last one decade has ventured into smaller cities as well. Another noteworthy development is mushrooming of online retail in India. On one hand expansion of retail space is happening on the other hand many variables are contributing to its growth as well.**

Various variables like urbanization, booming middle class, increasing fashion aspirations in smaller and sub-urban cities, penetration of organized retail into Tier 3 and Tier 4 cities are contributing to growth of this market. The urbanization (movement of people from rural to urban areas) in search of better job opportunities, enhanced standard of living, access of better facilities, better education for children is also contributing to urban consumption. Apart from urbanization as also mentioned by Ghosh "In addition, the high urbanization rate, an increasing share of women in the workforce, a young population and the availability of personal credit are driving the Indian economy (Ghosh 2010).

India's apparel market will be worth $59.3 billion in 2022, making it the sixth-largest in the world, and comparable to the UK ($65 billion) and Germany ($63.1 billion), according to data from McKinsey's Fashion Scope. The aggregate income of the addressable population (individuals with over $9,500 in annual income) is expected to triple between now and 2025 (The State of Fashion 2019, McKinsey and Company).

The study was done all outlets of Fashion at Big Bazaar (FBB-09 Stores), Reliance Trends (10 Stores), Pantaloons (07) and Max Fashions (05) in city of Lucknow which is capital of State of Uttar Pradesh. The study makes an attempt to find out what customers expects from an apparel outlet.

The study was done in 2 parts, in first part interviews of 31 Store Mangers of each outlet of 4 store chosen was done to understand what they feel customers expect from apparel stores. Thus a list of 10 variables was made further these 31 Store Managers were asked to rank these variables in order of preference.

In 2nd part, top 5 variables thus estimated were presented to 240 customers in Lucknow covering 31 outlets of chosen stores. 08 customers from each stores were targeted and data was collected through mall intercept survey. Apart from demographic information respondents were asked to rate their preferences for 5 variables namely Quality of apparels, Wide variety offered by retailers, Employee Services, Customer Services and Store Design and Display on 5 point Likert Scale.

The results indicate that out of these 5 variables Quality of apparels is most preferred while customer service is least preferred amongst the selected sample size.

Keywords: **Apparels, Customer services, Employee behavior, Organized retail, Quality.**

1. Introduction

India as a nation of shoppers and retailers seems to be true. Indian market is full of challenges and opportunities alike. The Indian textile industry is estimated at around 108 billion dollar and expected to reach 223 billion dollar by 2021. The industry also employs over 45 million people directly to 60 million people indirectly. The Indian Textile Industry contributes approximately 5 per cent to India's gross domestic product (GDP), and 14 per cent to overall Index of Industrial Production (IIP). The textile industry is also one of the largest contributor to India's export with approximately 13.5 percent of total export amounting 42.24 billion dollars.

(https://fashionunited.in/statistics/fashion-industry-statistics-india/)

Of the total textile industry apparel market will be worth $59.3 billion in 2022, making it the sixth-largest in the world, and comparable to the UK ($65 billion) and Germany ($63.1 billion), according to data from McKinsey's FashionScope

Indian apparel market has witnessed lot of action in last 05 years. On domestic front Reliance Trends has expanded very quickly and has reached to Tier 2 and Tier 3 cities as well. Brands like Benetton, Zodiac, Z3, Zara, Vero Moda, Calvin Klein, Diesel and Tommy Hilfiger have experienced good sales growth in the country, while names like Zara, Armani, Forever21 or Uniqlo appeal to the Indian audiences, attracting higher per square foot sales compared to the departmental or hypermarket stores.

The existing retailers like Pantaloons, Max, and Fashion at Big Bazaar (FBB) etc have also expanded fast. Some domestic players are their brief summary is as follows:

Pantaloons: A company owned by Aditya Birla Fashion Retail (ABFRL) is a leading player in value fashion segment with a network of 308 stores across the 155 cities in country, spanning over 4 million square feet. The company posted a turnover of 8118 Cr INR for financial year 2018-19 and profit

International Journal of Research in Engineering, Science and Management
Volume-3, Issue-5, May-2020
www.ijresm.com | ISSN (Online): 2581-5792

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after tax of 321 Cr INR a rise of 173% as compared to last year. Target audience is middle and upper middle class.

Fashion at Big Bazaar (FBB): An iconic fashion brand of Future Retail. With 94 stores in 46 cities spanning to more than 1 million square feet area has been a successful format after selling off Pantaloons to ABFRL. FBB also has its own online portal fbbonline.in for better convenience to consumers. The stores witness 1 Cr footfall in year 2018-19. Future group reported a turnover of 20,164 Cr INR and profit before tax of 732 Cr INR. Target audience is middle and upper middle class.

Reliance Trends: Reliance trends is leading apparel retailer in India with 777 stores across India and also offering online convenience through www.reliancetrends.com. Trends offers a combination of various national, international and private label brands to its customers. Reliance Retail since its inception in 2006 has expanded rapidly and Reliance Retail reported a revenue of 1.30 Lakh Cr INR (combined and not only of Reliance Trends but all formats taken together) for year 2018-19 which is highest by any retailer in India. Target audience is middle and upper middle class.

Max Fashions: Max Fashions is owned by Landmark group and has approx. 160 stores in India. Max started its operations in India in 2006 with their first store in Indore. Max in present in 16 countries worldwide. They also offer convenience by offering through website and mobile app. Max Fashion had plans to reach to a sales turnover of 3600 Cr INR. Target audience is middle and upper middle class.

The above are some organized retailer which cater to requirement of men, women and kids as well. Apart from them there are many other regional and local retailers as well. There are many retailers which cater specifically to either men, women or kids as well.

Since these 4 retailers have multiple outlets in Lucknow city as well, they were chosen for the study.

Indian Apparel growth contributors:

Indian middle class has always been contributing to the Indian Retail sector and one of the biggest attraction and focal point for foreign retailers.

Rapid urbanization, booming middle class, increasing per capita consumption, fashion aspirations in smaller cities is all contributing to the story. Urbanization refers to movement of rural people to urban areas and increasing aspirations of people living in smaller cities and sub-urban areas. As per reports By 2023, the middle class consumers which will form 43% of total targetable customer base will contribute about 55-60% share of total apparel market size (Apparel Consumption Trends in India by Wazir Advisors, pg.no:4). Movement of rural people to urban cities in a reality which is driven by reasons like better job opportunities, improved standard of living, better education for children to name a few. Fernandes (2006), Fuller and Narasimhan (2007) and Upadhya (2007) claim that the newness in the new middle class lies in its employment in new service activities brought about by economic reforms by liberalization and globalization.

Indian consumption is led by middle class which will further strengthen with times as one report t indicates that by 2030, India will move from being an economy led by the bottom of the pyramid, to one led by the middle class. Nearly 80% of households in 2030 will be middle-income, up from about 50% today. The middle class will drive 75% of consumer spending in 2030 (https://www.weforum.org/agenda/2019/01/10-mega-trends-for-india-in-2030-the-future-of-consumption-in-one-of-the-fastest-growing-consumer-markets/ accessed on 01st May, 2020). Some reports also mention that by 2030 nearly 80% pf household will be in middle class bracket from existing 50% today and this middle class will drive 75% of consumer spending in 2030.

(https://www.weforum.org/agenda/2019/01/10-mega-trends-for-india-in-2030-the-future-of-consumption-in-one-of-the-fastest-growing-consumer-markets/, accessed on 03rd May 2020).

Apparels have been witnessing increased expenditure as well which is also estimated to increase in future as well. As per reports per capita expenditure on apparels in expected to reach to INR 6400 by 2023 from 3900 INR in 2018 (Apparel Consumption Trends in India by Wazir Advisors, pg.no 3). This increased consumption is fueling growth aspirations of Indian Apparel retailers and forcing them to come with better offering and penetrate to even smaller cities and open more outlets in exiting ones.

Indian market offers great promise. Despite structural challenges (like poor infrastructure, weaker supply change, huge regional/ zonal differences in taste and preferences of customer, dominance or unorganized apparel retailers) strong economic growth, scale and rising tech-savviness will combine to make it the next big global opportunity in fashion and apparel.

Given these dynamics, it is little surprise that more than 300 international fashion brands are expected to open stores in India in the next two years. But India remains a complex market, which presents challenges as well as opportunities. The apparel business is still largely "un-organised," with formal retail accounting for just 35 percent of sales in 2016. Its share is likely to reach around 45 percent by 2025, (India Business of Fashion Report -2018)

Objective of Research and Research Methodology:

Keeping in mind the growth of organized retail and the promising growth apparels in India, the research was conducted to understand:

a) What variables retailers feel are desired by customers in a retail outlet.
b) Subsequent ratification of the same by customers.

The retailers chosen for the study were Pantaloons, Reliance Trends, Max, Fashion at Big Bazaar. The reasons for choosing these retailers included:

a) Their nationwide presence, thus they are very well known and established brands in Lucknow as well.
b) Their offering to men, women and kids as well.

International Journal of Research in Engineering, Science and Management
Volume-3, Issue-5, May-2020
www.ijresm.com | ISSN (Online): 2581-5792

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Similarity in offering and similar nature of outlets helps in treating all these outlets as similar units and hence there are high chances that customer expectations will also be similar.

c) All cater to middle and lower middle class of society which is the biggest contributor and promising. So these retailers cater to same segment and their selection will help in understanding the requirement of this segment.

d) They have multiple outlets in Lucknow thus covering various regions of the market. This helps in capturing customers' expectations from various markets and thus almost entire Lucknow.

e) Pantaloons has 7 outlets, Reliance Trends has 10, Max has 5 and Fashion at Big Bazaar (FBB) has 9 outlets in Lucknow

The study was done in 2 parts:

i) Interviews with Store Managers: Interviews were conducted with each store manager (total 31) to understand their perception of customers' expectations from their store, based on that a questionnaire was made and the store managers were asked to rank 10 variables in order of preference. The variables were:

Location of Store

- Quality of Apparels
- Wide Variety to choose from
- Customer Services
- Employee Behavior
- Store designing and visual Merchandising
- Promotional offers.
- Prices of Apparels.
- Availability of Private Label Brands
- Prior experience with Store.

All 31 store managers were asked to rank these 10 variables in order of preference. Based on 31 responses, 5 top rated variables were shortlisted and they were:

- Quality of Apparels
- Wide variety to choose from
- Employee Behavior
- Customer Services
- Store Designing and Visual Merchandising.

The variables mentioned above are in order of preference which means Quality of Apparels received highest rank and was rated on first position followed by other variables, Store designing and Visual Merchandising stood ta 5th Rank. Further, these variables were studied in detail and their role in customer expectations was also analyzed.

Quality of Apparels:

Quality happens to me much sought and talked about almost in all product categories. Starr (1972) defined quality as a quantitative adjustment which the consumer incorporates as an adjustment for the value and cost in respect to projected end use for the product. Monroe and Krishnan (1985) defined perceived quality as estimated ability of a product to provide satisfaction relative to other alternatives. The research work indicates that quality does play a very important role in deciding on final purchase as researches also indicate that consumers are increasingly using perceived quality to discriminate among product alternatives. (Morgan and Pollack, 1984; Rabin, 1983).

Quality may mean different things to different customers and its constituents might vary in different product categories as well. Not only to different product categories quality perception or expectation might vary from store as well say for example a purchases made from a discount store and a high end store will carry different quality expectation as well. Researches also indicate that consumers perceive the quality of a product differently depending on the store type from which the purchase is made (Darden and Schwinghammer 1985). Quality perception/expectation may vary with brands as well.

The interviews with Store Managers and previous research works establish the fact that quality is considered to be an important factor while purchasing apparels from organized stores.

Wide variety to choose from:

Product assortment commonly known as variety is defined as "the number of different variables in a merchandise category" (Levy and Weitz 1995, p. 30). Consumers asking for variety, struggling to find the right product amongst a heap of products are some common signs evident on shops. While purchasing customers wishes to choose the best one and in this process explores many products and seeks more options or wide variety to choose from.

Not only customers it is equally important for retailers to offer wide variety in their stores this helps them in catering to varied taste and preferences of customers and previous researches also indicate that wider assortment offered in a shopping center helps retailers cater to the heterogeneous tastes of their patrons (Dhar et al. 2001). Not only can greater variety help a retailer attract more consumers, it also can entice them to make purchases while in the retail center.

A wide selection of products also can minimize the perceived costs of customers (e.g., travel time, effort) associated with each shopping trip and ease the shopping task (e.g., by enhancing comparison shopping); it also implies that a retailer offering greater/wider variety in product categories can improve shopping convenience and make it easier for consumers to combine their visits to different stores (Dellaert et al. 1998).

Wider variety or more options are important expectations of customers as they are beneficial for both customers as well as retailers, in fact an empirical study by Stassen et al. (1999) shows that the assortment decision in a store is as important, if not more important, than other key variables such as price. Hence getting access to wide variety of apparels is a crucial expectation of customers.

International Journal of Research in Engineering, Science and Management
Volume-3, Issue-5, May-2020
www.ijresm.com | ISSN (Online): 2581-5792

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Customer Services:

During interviews with Store Managers it became evident that customer services in apparels cover alternation services, arrival alert services, product refund services, loyalty programs etc. and customers expect better and convenient services to be offered. Previous researches have also indicated crucial role of customer services for example, Finn and Louviere (1990) found that shopping centers that provide good service and a wide selection, but less emphasis on low prices, are more likely to fall into shoppers' consideration set (i.e., retail alternatives a consumer is aware of and evaluates positively). Further in studies conducted by Malhotra (1983) while proposing model for store choice, he identified service as one amongst the five identified salient characteristics the others included variety and selection, acceptable prices, convenience of location, and physical facilities. Similarly, Visser et al (2006) in their studies found that service plays an important role and affects apparel store image attributes as perceived by female consumers. The results were based on eight focus groups. Services play a crucial role in customer satisfaction as well and also helps in gaining competitive advantage in today's competitive marketplace (Quader, 2009).

Based on previous research work and interviews with Store Manager Customer services was also taken as one factor for further identification.

Employee Behavior:

Customer services and employees are related to each other is certain aspects, the level of services delivered and satisfaction from same will be affected by attitude of employees as well. However in this study during interviews with Store Managers they defined employee behavior and reflected during interaction with customers in store his communication, empathy, fashion advisory, courtesy of sale employees as well as other employees like cashier, security guard etc. So this factor has been approached with same perspective in this study.

In retail interaction with front end employees cannot be avoided and the role of employees become all the more important. Previous researchers have found that many services are heavily people-based (Va´zquez-Casielles, Del Rı´o-Lanza, & Dı´az-Martı´n, 2007) and most service delivery depends on frontline employees to provide a link between the service organization and customers. Hence in retail as also mentioned by Store Managers role of front line employees like floor staff and cashiers become very important.

Researchers have also considered consumer perceptions of face-to-face interaction with contact personnel as one of the most important determinants for service quality, satisfaction, and loyalty (Wang, 2009). Service marketing literature also acknowledges the importance of personal interaction in the service encounter (Constanti & Gibbs, 2005). Studies have recognized employee performance as vitally important to service marketers, and that the service employee plays a critical role in the service encounter (Voon, Hamali, & Tangkau, 2009; Wieseke, Ullrich, Christ, & Van Dick, 2007). These researches clearly indicate that employee interaction with customers plays a very critical role and is rated highly by apparel retailers as highly expected variables by customers. Wang (2009) studied the impact of positive emotions exhibited by the store personnel and found it to be a critical factor.

Store Design and Visual Merchandising:

In Marketing it is said "Jo Dikhta hai wo bikta hai" meaning there by whatever is displayed well sells well, probably from the interviews of Store Managers it became evident that in apparel retail context display is important. The design of store, attractive display of products definitely makes the shopping much more exciting, engaging and encourages customers to purchase. Researchers have acknowledged the importance of pleasure and arousal as emotional states that mediate between store environment stimuli and approach/avoidance tendencies (Kaltcheva and Weitz, 2006). Researches like Gilboa and Rafaeli, 2003, also acknowledge the link between environmental aesthetics and preference.

Overall shopping experience is dependent on variables such as store atmosphere, layout, merchandise availability, and merchandise display. Researchers like Baker et al. (2002) have found that shopping experience and design cues negatively impact time, effort and psychic costs and that Store design cues positively impact perceived merchandise quality. This indicates that a good store design will facilitate more time spend in store and will overall enhance the experience of customers. Similarly, Newman and Foxall (2003) have established the strong role of layout, store setting, merchandise arrangements in the consumer behavior patterns.

Taking cue from interviews of Store Manager and from previous research work Store Design and Visual Merchandising was also taken for study.

A questionnaire was prepared based on these 5 variables and the variables were briefly explained as well (2-3 lines) to ensure congruity of understanding. These variables were:

a) Quality of Apparels
b) Wide variety to choose from
c) Employee behavior
d) Customer Services
e) Store Design and Visual Merchandising.

As mentioned earlier total 31 stores of 4 retail outlets were chosen for study and it was decided that 8 samples will be collected from each store. The data was collected through customer intercept survey in malls as well as where they were present as individual stores. Total 248 customers were covered for study out of which 240 responses were found to be complete in all respect.

The number of outlets of chosen 4 stores in Lucknow are as follows and targeted sample size from each store is mentioned in following table:

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Table 1
Number of outlets of stores chosen for study and targeted sample size

S.No.	Name of Retailer	No of Outlets In Lucknow	Number of Respondents Targeted
1	Fashion at Big Bazaar (FBB)	09	72
2	Pantaloons	07	56
3	Reliance Trends	10	80
4	Max Fashions	05	40
	Total Outlets and sample size	31	248

2. Data Analysis and Interpretation

Total 240 responses were found to be complete in all respect. The demographic details of respondents is as under:

Table 2
Demographic profile of respondents

Age	20-30	45	18.75
	30-40	117	48.75
	40-50	61	25.42
	50 and above	17	7.08
Gender	Male	65	27.08
	Female	175	72.92
Occupation	Private Service	79	32.92
	Government Service	51	21.25
	Self Employed	66	27.50
	Student	38	15.83
	Others	6	2.50

Further to analyze the rating of different customers as given by 240 customers, Non-Parametric k-related sample tests were applied to test the null hypothesis of equal importance provided to all five variables by the respondents. Friedman Test was used for this purpose. As per the table 4, the p-value (sig. = 0.000 < 0.05) suggest that null hypothesis is rejected at 5% level of significance. Hence, there exists a significant difference among the six decision variables as perceived by the customers.

As per the table 3, it has been suggested that the most important perceived variable comes out to be 'Quality of Apparels" (Mean Rank = 3.29), followed by 'Wide variety of apparels to choose from' (Mean Rank = 3.17) and so on. The last being 'Customer Services' (Mean Rank = 2.72).

Table 3
Rating of 5 variables taken for study

	Mean Rank
Customer Services	2.72
Employee Behavior	2.80
Store Design and Visual Merchandising	3.02
Quality of Apparels	3.29
Wide variety to choose from	3.17

Table 4
Test statistics

N	240
Chi-Square	26.962
df	4
Asymp. Sig.	.000
a. Friedman Test	

In order to confirm the results, obtained by the Non-Parametric Friedman Test, another Non- Parametric k-related sample test Kendall's W Test was employed. The results obtained by the Kendall's W Test (Table 5 and Table 6) reiterated the results obtained by the Friedman Test.

Table 5
Customer rating of 5 variables taken for study

	Mean Rank
Customer Services	2.72
Employee Behavior	2.80
Store Design and Visual Merchandising	3.02
Quality of Apparels	3.29
Wide variety to choose from	3.17

Table 6
Test Statistics

N	240
Kendall's Wa	.028
Chi-Square	26.962
df	4
Asymp. Sig.	.000
a. Kendall's Coefficient of Concordance	

The results of Friedman and Kendall test were in congruence and thus it may be summarized that customer expectations in order of preference for 5 variables chosen for study were as follows:
a) Quality of Apparels
b) Wide variety to choose from
c) Store Design and Visual Merchandising
d) Employee Behavior
e) Customer Services.

Thus apparel retailers need to lay proper emphasis on these variables to ensure they are able to meet the expectations of the customers.

3. Managerial Implications and the Road Ahead

Research indicates that quality of apparel is considered to be most important expectation of customers. Quality perception and evaluation may vary from one product to another, from the store name and from many other factors. Hence understanding the real notion of quality with reference to apparels is equally important. Research has been done to better understand the notion of apparel quality, these studies ranged from focusing on uni-dimensional scales to multidimensional scales. On one hand the results of these studies have been mixed. Researches like O'Neal, 1988; Lennon and Fairhust, 1994; Hines and O'Neal, 1995 concluded that customers used variety of cues to evaluate quality. This may be used by retailers to understand the notion of quality as perceived by their customers some researchers have classified apparel quality into extrinsic and

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www.ijresm.com | ISSN (Online): 2581-5792
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intrinsic variables. Wherein extrinsic variables will cover variables which are product related but not a part of physical product like brand of apparel, price of apparel etc. The intrinsic variables are inherent to the product and may include type of fabric, construction of fabric etc. (Davis, 1985, Hatch and Roberts, 1985, Eckman et al.,1990, Hawkins et al., 1995, Forney et al., 1999). Intrinsic cues such as fabric or construction techniques are inherent in the product and cannot be changed without changing the product (Olson and Jacoby, 1972).

Furthermore, a consumer's perception of the quality of a store's merchandise relates to the patronage of that store (Darley and Lim 1993; Jacoby and Mazursky 1985; Olshavsky 1985). As an important component of store evaluation, merchandise quality has a positive link to merchandise value (Grewal et al. 2003). Good quality products will ensure retail patronage or loyalty or intent to visit again and again and hence should be given emphasis to as well.

Similarly, wide variety to choose from not only reduces the costs for customers but also provides more convenience and enhances the store image as well. As a major retailer descriptor, product selection contributes significantly to the explanation of patronage of alternative retail centers (Arnold et al. 1983; Craig et al. 1984; Koelemeijer and Oppewal 1999; Louviere and Gaeth 1987). Wide variety has also been found to affect retail patronage behavior as well.

Providing wide variety to choose from and quality apparel will fulfill the expectations of customers and will make them happier and will make them more loyal to retail outlets as well.

Similarly, previous studies have found a direct link between service quality and patronage intentions (e.g., Baker et al. 2002; Sirohi and McLaughlin 1998; Zeithaml and Berry 1996) and some researches haves found good customer service as essential for relationship retention between the customer and the retail business (Julian & Ramaseshan, 1994). This largely indicates that employees should not only be sensitized but also trained to reflect courtesy, empathy and good communication skills while dealing with customer's further cashiers, security guards should also be trained in the same.

Apart from employee behavior adequate emphasis should be given on customer services. Employee behavior and customer services will also help in building store loyalty.

Store designing and visual merchandising is another area of concern, some aspects of store designs are fixed while varied display options add flexibility to same. Further as previous researches indicate this aspect has to be taken in totality rather than adopting a piece meal approach. Moreover, research now stresses considering the store environment as a whole, because consumers evaluate store environments holistically and not piece by piece (e.g., Bitner, 1992; Garaus et al.2015).Mattila and Wirtz (2001: 274) suggest that "consumer responses to a physical environment depend on ensemble effects (configurations)," and Murray et al. (2015: 475) note that "for studies of the store environment to progress beyond employing singular atmospheric variables (e.g., music and olfactory

investigated separately), few efforts advance explanations of consumers' holistic processing of multiple cues and atmospheric stimuli." Hence, retailers must pay particular attention to the configuration of all in-store elements (Babin et al., 2004). Based on these notions, studies have investigated the effect of cue congruence in terms of its arousing qualities on shopper response (Mattila and Wirtz, 2001; Spangenberg et al., 2005).

Store design and music influence buying emotions (Liao et al. 2011). Yun and Good (2007) have found that a favorable store image depends upon merchandise, service, and shopping atmosphere. Better store image increases patronage

Thus it may be concluded from research above that the 5 variables chosen for study namely quality of apparels, wide variety to choose from, Employee behavior, customer services, store design and visual merchandising are crucial expectations of customer's visiting apparel outlets. Further if managed properly they increase the store patronage or re-visit intention of customers or loyalty towards store.

Some limitations of the research include

a) Only 5 variables were taken for validation from customers, researches may be conducted to take other variables as well. These variables were shortlisted based on their ranking given by 31 store managers of chosen stores namely Fashion at Big Bazaar, Pantaloons, Reliance Trends and Max.

b) Research is done in Lucknow only and hence reflects the expectations of customers from Lucknow only and may not be deemed fit for generalization. Similar studies if conducted in other parts of the country also verifies the results then a generalized proposition may be formed which may be used by retailers across the country.

c) Only 4 retailers were chosen for study who are catering to almost similar target segments and have offering for men, women and kids alike. In future researches different retail outlets covering broad target segment may be taken which will facilitate generalization of findings as well.

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